DOCUMENT RESUME

ED 305 846 HE 022 380

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TITLE Cost Effective Means To Gather Demographic Data and Forecasts for the Social and Economic Future.
PUB DATE 16 May 88
NOTE 15p.; Paper presented at the Annual Meeting of the Association for Institutional Research (Phoenix, AZ, May 15-18, 1988).
PUB TYPE Reports - Descriptive (141) -- Speeches/Conference Papers (150)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *College Planning; *Demography; Economic Research; *Futures (of Society); Higher Education; Information Seeking; *Prediction; Sociocultural Patterns; *Socioeconomic Influences
IDENTIFIERS *Strategic Planning; *Western Illinois University

ABSTRACT

The approach used at Western Illinois University in fiscal year (FY) 1987 and FY 1988 to develop a more proactive planning style is described. The approach involves a process of identifying and monitoring issues and opportunities that includes the following: (1) environmental scanning to identify issues, which are then rank-ordered for their potential impact; (2) committee investigation of the issues; (3) development of an electronic file of relevant documents and articles; and (4) a monthly newsletter. Access to other materials, including an electronic database from the United Way of America's Strategic Planning Division, is also described. A bibliography that contains 11 references is provided. Appended are a sample newsletter, sample abstracts, promotional material for a future-oriented publication, and charts depicting the strategic planning process. (KM)

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Cost Effective Means to Gather Demographic Data and Forecasts for the Social and Economic Future

by

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Panel presentation at the annual forum of
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May 16, 1988

HE 022 380

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Cost Effective Means to Gather Demographic Data
and Forecasts for the Social and Economic Future

The role of the planner in higher education has been described as being similar to that of a fireman putting out a series of small fires as crises develop each day of the week. Although it is necessary to deal with these crises, it is also important to develop plans to deal with emerging trends and issues that may have an impact on the institution. This presentation describes the approach used at Western Illinois University in FY1987 and FY1988 to develop a more proactive planning style. A process of identifying and monitoring issues and opportunities will be described. Although each campus is unique in terms of its politics, funding and organizational structure, elements of this approach should be useful to others on their campuses.

The Council on Planning, a group representing each vice presidential area, the deans, the faculty, civil service employees, the alumni and the administration was used as the vehicle to look at the future of the institution. The Director of Institutional Research and Planning (IRP) chaired the council and he and three other staff members of the office assisted in chairing the four committees that examined issues raised by the council.

An environmental scanning process similar to that described by Morrison, Renfro and Boucher in Futures Research and the Strategic Planning Process: Implications for Higher Education was used to identify issues that needed to be addressed by the institution. An exercise to identify issues important to the institution was used to encourage the participants to brainstorm about emerging trends that were of concern to them. These issues were then summarized and the participants ranked them on the basis of their potential impact on the institution. Two time parameters were used (less than five years and five years and beyond) to show that issues could be important in either the short or long range, or in both, and to get the planning group oriented toward the longer range issues that are often ignored.

Four committees (academic, student, technology and resource) were formed to explore the broad areas encompassed by the issues and trends identified earlier. Staff members of IRP facilitated each of these committees and provided data and trend information as needed. An environmental scanning and forecasting system was developed to augment this process. Council members were encouraged to abstract relevant journal articles or other documents or forward them to IRP for abstracting and distribution.

Faculty and administrators provided journal articles and documents on issues discussed by the council, and the staff in IRP wrote the abstracts of these references. An electronic file to store these abstracts was set up, but hard copies are kept in a central file for ease of retrieval of the articles currently on file. As issues come up for discussion in various planning groups, it is convenient to go to the file and select copies of abstracts or, in some cases, entire articles for background information for those studying the issue. This is something that almost anyone who has an interest in an issue will do -- this process is simply a more formal and organized approach than most institutional research offices have undertaken. The same process could be developed in any office to track emerging issues and trends that may have implications for that office or for its institution.

In addition, a monthly newsletter that highlights trends of possible interest to the institution is distributed to all administrative offices and academic departments. The material used is generally from recent issues of higher education journals and other publications that address the trends that have been identified as important to monitor (Appendix A).

Several groups have developed more elaborate systems to assist in retrieving relevant materials. These include the Higher Education Media Scan (HEMS) developed by Kathleen Bissonnette and Jeffrey E. Dutton. The HEMS reference system contains bibliographic entries on articles in major higher education publications and allows the user to select topics by keyword fields or article titles. Local information and keywords can also be added to allow users to customize the package to their campuses. The cost of a subscription for one year is $150 for individuals or departments and $500 for institutions.

A more comprehensive database is available from the United Way of America's Strategic Planning Division. This electronic database uses a network of scanners located throughout the United States to provide environmental scanning for indications of new trends and developments which might become issues for United Way agencies. They also monitor trends that have previously been noted as relevant to the United Way. These issues cover social, economic, political, technological and other trends that institutions of higher education would also want to monitor in many cases.

Access to this data is through the United Way of America Human Care Network. This is an electronic network that can be joined at a cost of $310 for two user ID's, manuals, software and unlimited access to a technical support line. The charge for use of the data base is $.62 per minute. The average cost has been around $1.50 based on 2-3 minutes usage. The major advantage of this network is the comprehensive nature of the material and the fact that abstracts can be retrieved through the electronic network (sample abstract in Appendix B).

Other materials available from the United Way include a series of environmental scan reports that are updated yearly. These reports contain a wealth of "key driving trends" and related graphs and charts. The graphs and charts can be purchased in black and white large format illustrations for overhead transparencies or to include in local reports. A series of 64 slides of the charts and graphs can also be purchased (copy of order blank in Appendix C).

In summary, the future oriented approach to identifying trends and issues used by Western Illinois University has been well received overall and was judged to be effective by the participants. The emphasis was on strategic planning with an external focus that included continual scanning to identify issues occurring in the environment. Local "experts" were brought into the process as new trends or events were identified that needed to be explored.

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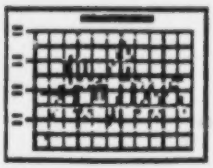
Appendix A



TREND LINES

. . . Looking to the Future

A Newsletter from the Office of Institutional Research & Planning

Volume 1, Number 2 May, 1988

Lowell Lueck, Editor

A recent publication of the American Association of State Colleges and Universities entitled A Call for Clarity: Income, Loans, Cost examines the college cost debate that has been raging across the country in recent years. Some of the conclusions and findings follow:

Cause of Tuition Increases - There has been a decrease in public support of higher education. This, in turn, has increased the amount that students and families must pay. If state appropriations remain stationary or decrease, tuitions usually are increased to cover the increased costs.

Higher Education Price Index (HEPI) - The costs associated with delivering classes to students have increased faster than the consumer price index (CPI) in recent years. The HEPI increased over 50 percent from 1980 to 1985 compared to a CPI increase of less than 30 percent.

Ability to Pay - Households headed by women tripled between 1970 and 1985. These households have only about half the income of those headed by couples, but have a disproportionate share of the young people who will soon be of college age.

Savings - as a percent of disposable income, savings have declined from about 8 percent in the early 70's to less than 4 percent in 1986.

Poverty - Although the official poverty line (the income level below which a person or family is considered living in poverty) has been raised, the number of people below the poverty line has increased from 22 million in 1973 to 33 million in 1985.

Student Aid - Institutionally funded student aid has increased since 1980 because of a dramatic drop in federal student aid. These increases reflect efforts being made to attract and retain the needy student.

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Journal Costs - The high cost of scientific journals is being solved by groups of colleges and universities sharing some titles of a peripheral nature and maintaining a core for regular use. Also, some feel electronic transmission of documents may save money (Source: Administrator, Vol. 7, No. 7, April 22, 1988)

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Compact Disc Technology - A recent report from Time magazine tells how the personal computer and the compact disc can be used

together, with each compact disc (CD) having the storage capacity of 1000 floppy disks. At that rate it should be possible in a few years to carry most of the reference works you need in a briefcase and access them on a personal computer. (Source: Time, April 11, 1988)

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Interest in Teaching - Higher Education and National Affairs has reported an increase in the number of freshmen interested in teaching at the elementary and secondary level. From a low of 4.7 percent in 1982, the percentage increased to 8.1 percent in the Fall of 1987.

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Good News & Bad News - Corporate giving to higher education increased by four percent in 1986 . . . that is the good news. The bad news is that this four percent growth rate is the lowest in the last ten years.

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The Conference Board, a business information service, has just released a publication entitled Keys to U.S. Competitiveness that is the result of a nationwide survey supported by the Board, the National Governors' Association and the National Science Foundation. Some results of the study include:

1. Education was seen by business, academic and government leaders as the key to maintaining economic competitiveness. There was a concern at all levels over the quality of science, engineering and mathematics education, and K-12 education overall.

2. University officials expressed concern over maintaining state-of-the-art facilities and equipment. Related issues concerned the quality of students and the ability to attract and retain qualified faculty.

3. Business officials were concerned about sustaining a technically up-to-date workforce that can be retrained easily. University officials were supportive, but could not agree on who should provide the education and training.

4. Industry/ university research partnerships are needed according to both business and university officials,although university officials are more optimistic about the possible impact of such relationships on U.S. competitiveness.

INFORMATION RETRIEVAL:

SAMPLE ABSTRACT:

SCAN: 93

TITLE: Migration's Toll: Lessons from New York State
AUTHOR: Alba, Richard & M. Batutis
PUBLICATION: American Demographics
DATE: 06/01/85
DESCRIPTOR: REGIONAL MIGRATION; IMMIGRATION TO US; REGIONAL POPULATION SIZE

ABSTRACT:
New York loss through migration from 1975 to 1980: 650,000 people. Like other high population losers in Northeast and Midwest, N.Y. lost mostly to the Sun Belt. In-migrants replacing lost population included 460,000 immigrants from abroad. Population exchange resulted in net losses of elderly; whites and blacks (gains of "other" races -- mostly Asian -- and Hispanics); the college educated; armed forces personnel; and gain of low income population (esp. in New York City). Forces shaping migration: suburbanization, attraction of Sun Belt, and restricted job opportunities.

GROUPS: IMMIGRANTS
REGIONS: NORTHEAST; SUNBELT; MIDWEST
FILE CODE: S-2
GRAPHS: 2 tables.
SCANNER: Forbes
COMMENTS: none

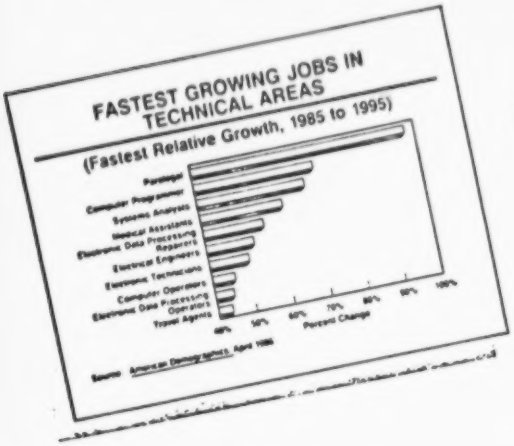
Data may be retrieved by name of author, publication, date of publication, file code, scanner, and entry date. Most frequently, retrieval is done through the keyword system -- descriptors, groups, and regions. A user could retrieve the above abstract, for example, by asking MIST+ for all entries coded under "Regional Migration," "Immigration to US," or "Regional Population Size." If the user entered any one of these descriptors, the system would also present all other abstracts coded with the same descriptor. So if a user was interested in "Immigration to US," the system could quickly retrieve a number of abstracts about this subject. The user could also retrieve the above abstract by asking for information about the group "Immigrants" or about the regions listed -- "Northeast," "Sunbelt," or "Midwest."

LOOKING TOWARD THE '90s:

SLIDE SHOW

This slide show includes multicolor slides of each of the charts and graphs illustrating What Lies Ahead—Looking Toward the '90s.

Additional word slides summarize trends and introduce the main sections of the slide show. An accompanying script fully describes each of the slides. Organizations may show the entire presentation, which consists of 64 slides, or tailor the presentation to fit their own needs by selecting slides of greatest interest.



LARGE FORMAT GRAPHICS

Black-and-white reproductions of all the charts and graphs in What Lies Ahead: Looking Toward the '90s are available in large (8½" x 11") format. These can be used to create overhead transparencies or to illustrate local scan reports.

ORDER FORM

What Lies Ahead—Looking Toward the '90s

Looking Toward the '90s Publications

_____ copies at $10 each for United Ways*; $15 for other organizations; plus shipping charges. (Catalog No. USPO 502)

Looking Toward the '90s Slide Show

$55 for United Ways; $75 for other organizations; plus shipping charges. (Catalog No. USPO 553)

Looking Toward the '90s Black-and-White Large Format Illustrations

$15 for United Ways; $20 for other organizations; plus shipping charges. (Catalog No. USPO 554)

Total payment (including applicable discounts): $_____

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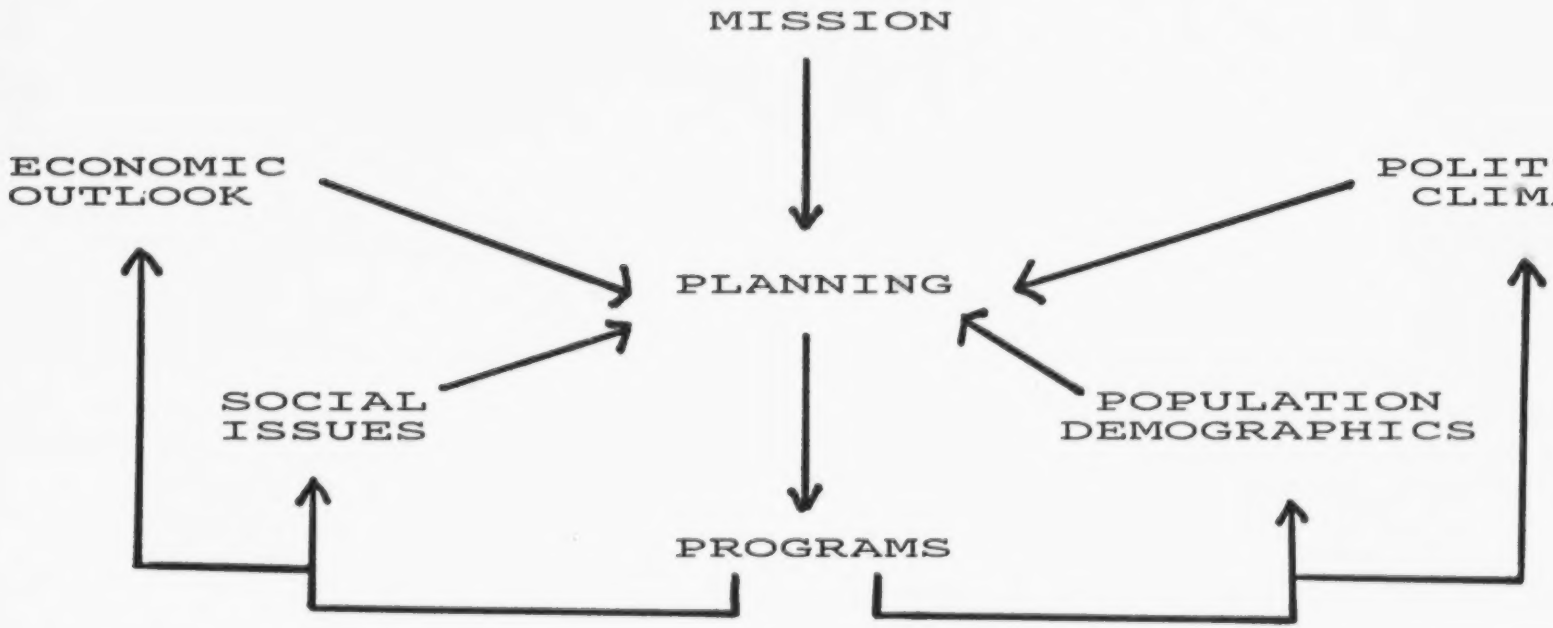
ENVIRONMENTAL INTERACTION PLANNING MODEL



Appendix D

Academic = A
Resources = R
Students = S
Technology = T

TOP TRENDS, EVENTS AND EMERGING ISSUES

Ranked According to Probable Impact on WIU Over Next 5-25+ Years

			Mean Rating
A	1.	Keeping academic programs on the "cutting edge"	1.14
A	2.	Development of new programs as need arises	1.21
T&A	3.	Need to replace and update instructional equipment	1.28
S	4.	Expanding market for non-traditional students	1.57
A	5.	Difficulty in keeping current in rapidly changing world (faculty)	1.60

Appendix F

ABSTRACT

File Name: Students, Adult

"ACE Generates Improved Adult Education Programs," Higher Education and National Affairs, March 23, 1987, p. 3.

ACE announced results of a self-assessment of 50 colleges and universities on services and programs for adult students. These included: (1) increased financial aid, (2) more flexible academic policies, (3) new orientation programs, (4) revised admission criteria, (5) more accessible academic advisors, (6) new courses and programs, (7) revised class schedules, (8) new recruiting strategies, (9) sensitivity workshops for faculty and staff, (10) improved data collection, (11) student registration by telephone, (12) expanded supportive service hours, and (13) an adult student center.

Implications: WIU may have to consider implementing many of these concepts to support adult students at the Rock Island Regional Undergraduate Center (RIRUC).